Schedule Update Process (Options)

1. Gerry recommends updating weekly—early warning for Ken (no surprises).
2. Dave--give reports/schedules to appropriate contacts no later than noon, on Mondays.
    a. Gerry—all Non-Clinical Tasks
    b. Val--all Clinical Tasks
    c. Mingdah—all SCoR Communications
    d. Raymond—[illegible] Communications
3. Contacts return updated reports/schedules to Dave no later than close of business Tuesdays. Also notify Dave if there are no changes.
4. Question: What information and in what format does Debbie and Mike Werley need from the contacts and/or Dave?
5. Some Updating options for the contacts--with pro's and con's:

1. **Generate "Start By and Finish By" Filter for each contact's area of responsibility for each master plan and send by email:**
    a. Pro's
        i. Electronically sent as an attachment by email
        ii. Tasks defined only for contact's area of responsibility
        iii. By changing to another view, you can see the entire master plan
    b. Con's
        i. The entire Master Plan is sent as the attachment—not just the filtered task report.
        ii. Filtered task report does not automatically appear when you open the master plan. You will have to generate the filter yourself.
        iii. Difficult to identify what updates were made—each section is color-coded. Could include some special fields for updating purposes only, like a start and finish 10 field, and text fields for % complete, etc.
        iv. No paper trail for history if required.

2. **Generate and copy "Start By and Finish By" Filter for each contact's area of responsibility for each master plan to an Excel spreadsheet and send by email:**
    a. Pro's
        i. Electronically sent as an attachment by email
        ii. Tasks defined only for contact's area of responsibility
        iii. Easy to update tasks and return

? future tasks

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b. Con's
   i. Additional steps: filter, copy to Excel, and manipulate fields as needed and then email as attachment.
   ii. Fields do not show up when you copy to Excel; also you lose all your outlining/indents—all tasks are left justified. If desired, would have to insert field names and indent tasks prior to emailing
   iii. Only see filtered tasks and not entire master plan.
   iv. No paper trail for history if required.

3. **Provide hard copy schedules with same "Start By and Finish By" Filter for each contact's area of responsibility for each master plan:**
   a. Pro's
      i. Easy to update—line through and make changes in red
      ii. Tasks defined only for contact's area of responsibility
      iii. Have a paper trail for history if required
   b. Con's
      i. Printing many copies of the filtered plans
      ii. Hand carrying Vs Electronic distribution and return.
      iii. Do not have ability to see the entire master plan to assess overall impact of changes

4. **Provide hard copy of the entire master plan without any filtering.**
   a. Pro's
      i. Easy to update—line through and make changes in red
      ii. Provides a more thorough updating process since you will have to look at each incomplete task and update as necessary.
      iii. Ability to update past filtered tasks (for example if you have confirmed dates on testing and when reports will be done, etc)
      iv. Ability to see impact on entire schedule and if necessary report impact to Debbie, Mike and Ken in a timely manner.
      v. Have a paper trail for history if required
   b. Con's
      i. Printing many copies of the plans
      ii. Hand carrying Vs Electronic distribution and return.
      iii. Will take more time to look at plan and determine what needs to be updated
      iv. Excess hard copy updates for storage

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